

How to: Use and manage Virtual Phone Bank

Setting up your phone bank

To set up your phone bank for a successful outreach effort, you will:

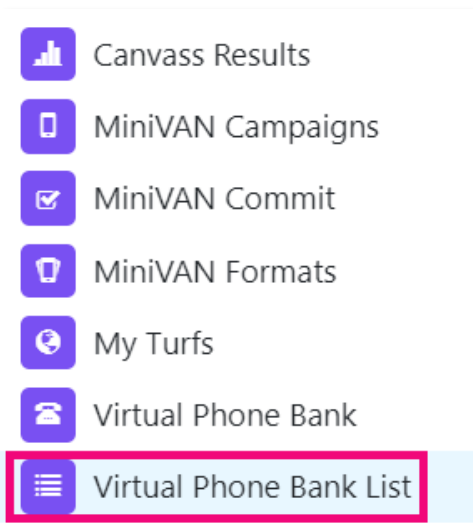
- Create a list of people to call
- Choose what information your callers can see about each person
- Schedule your phone bank
- Administer additional settings

Creating a list

Before you can set up your phone bank, you will need to have a list created. **If your list is prepared, you can create a new phone bank from the Virtual Phone Bank list page.**

Open **Virtual Phone Bank List** from the Sidebar.

Select Add new phone bank and choose your Saved search.



Add New Phone Bank ✕

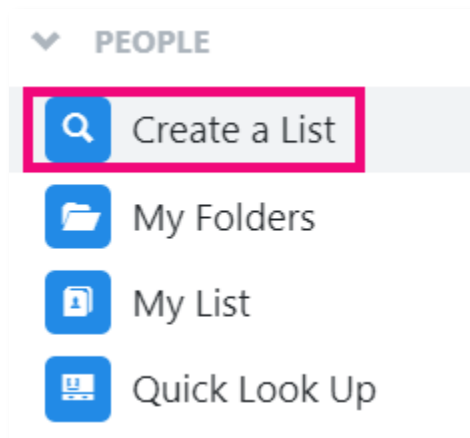
Which contacts would you like to include in the first round of this virtual phone bank?

Saved Search*

Florida ✕ ▾



Cancel Continue


If you're starting without a list, find **Create a List** on the Sidebar.






The Phones dropdown will **limit your targets to people with phone numbers**. Choose the Phone Type - home, cell, etc. You may also choose to include only those numbers that have been manually verified by checking **Preferred phones only**. Virtual Phone Bank will only display preferred phone numbers. **Only Home and Cell numbers can be considered "preferred"**, so Virtual Phone Bank is not recommended for contacting businesses or people at their offices.





▼ Phones ★

Added Since  


Is a Cell? (What's this?) 


Source  

SMS Opt-In Status 

Type    

Phone Quality Score

 Preferred Phones Only

 Textable Phones Only


Use the Suppressions section to Exclude Do Not Call and, depending on your outreach goals, you may also want to filter by Early Voting status at this time.


▼ Suppressions ★


[Remove All Suppressions](#)


Include people who have:


- Good Voting Address
- Bad Voting Address
- Good Mailing Address
- NCOA Mailing Address
- Bad Mailing Address











Before you run your search, you'll want to **be sure that you have enough phone numbers for your callers**. Calculate how many numbers you will need using the following formula:

$(40-50 \text{ contacts}) \times (\text{number of volunteers}) \times (\text{the number of hours each person will be making calls})$

Select Preview My Results to see the number of contacts and phones you have and adjust your search criteria until you achieve the right list size.

The screenshot shows a search configuration window titled "Step 1: New Search". It lists various search criteria with their current values:

- Age/Sex/Registration**: Age is between 18 and 35
- Early Voting — Exclude the following:** Returned the Ballot = Yes and Early Voted = Yes
- Party**: Party = Democratic or Green or Independent
- Phones**: Phone Types = Cell or Home and Is a Cell? = Verified Cell or Likely Cell
- Sex**: Sex = Male
- Addresses**: Zip Code is within 25 miles of 32789
- Voter Status**: Registration Status = Active or Inactive or Provisional
- Suppressions**: exclude Deceased and include Good Voting Address only and include Good Mailing Address only and exclude Do Not Call and include Do Not Email

At the bottom, there is a blue bar with a magnifying glass icon and the text "Preview My Results". Below this, a summary box shows:

- 9,796 People
- 9,461 Phones
- 9,651 Doors
- 9,680 Mailboxes

At the bottom of the window, there are two buttons: a white button with a plus sign and the text "Add Step", and a green button with a play icon and the text "Run Search".

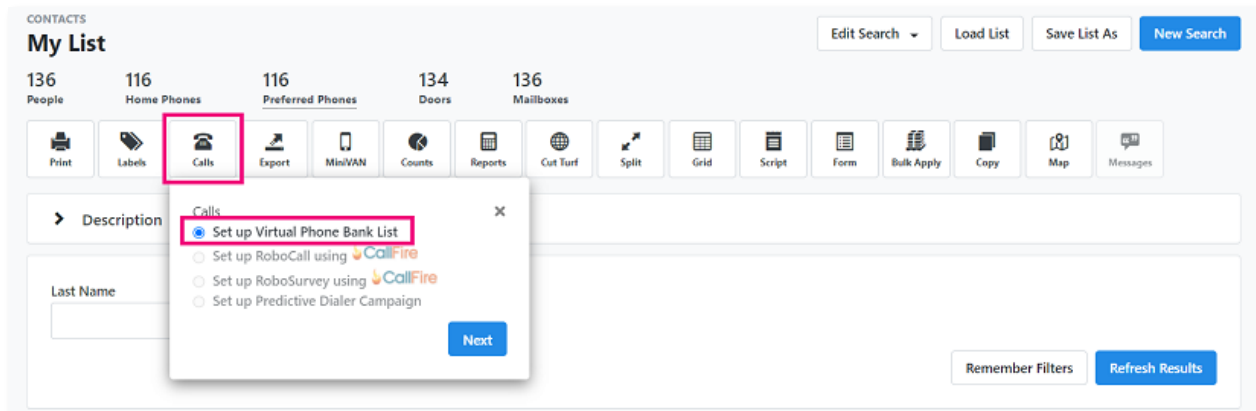
[Read more about creating a list](#)

After you run your search, Home Phones and Preferred Phones appear at the top of My List. Use Edit Search if you need to make adjustments.

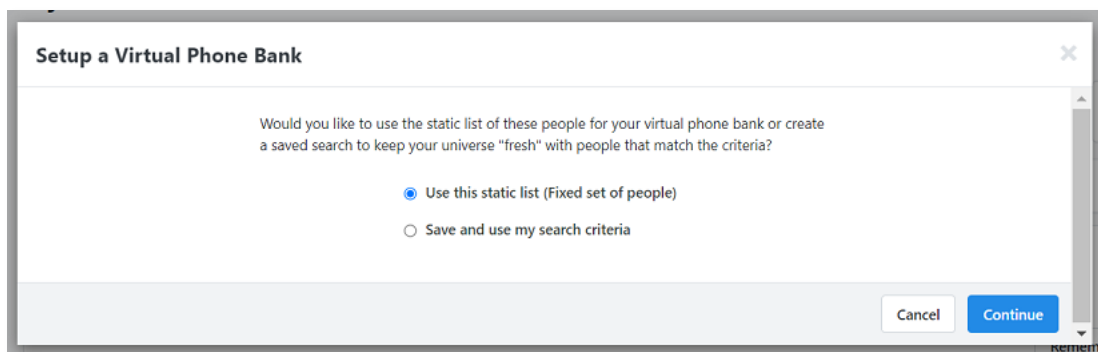


Getting Started

To phone bank with the list you just created, **select Calls** followed by **Virtual Phone Bank (VPB)**. To access lists or saved searches you created previously, select My Folders on the Sidebar.



You will have the choice of using a static list or a saved search. **A static list is a fixed universe** of contacts. It will remain the same, one calling round to the next, regardless of call results. **A Saved Search is dynamic**, the universe refreshes when you move to the next round of calls. Continue to proceed to the Virtual Phone Bank settings.



You will be asked for information in the following sections:

- Virtual Phone Bank Details
- Sharing
- Events
- Additional Settings

Setting Virtual Phone Bank Details

- **Choose your preferred script** and consider whether you will run a standard Virtual Phone Bank or use OpenVPB. **VPB only supports linear scripts**, whereas **OpenVPB supports both linear and branched ones**.
- Additionally, a unique feature to **Open Virtual Phone Bank** provides the ability to set a default script and up to 4 alternate scripts. Scripts can be directed to certain people by selecting a script using the targeted subgroup option. Callers are able to toggle between scripts in the Open Virtual Phone Bank.

[Read more about scripts](#)

- **Set the Start and End Date.** This is the **period during which callers can access the phone bank**. Callers attempting to log into the phone bank outside of this period see a message that the code is invalid!` 21` . After the end date, the phone bank status converts to **Inactive**.

Virtual Phone Bank Details

Calling Round 1

Name* General GOTV 2nd touch

Description Reminder when and where to vote.

Script* General GOTV

Start Date* 11/1/2022

End Date* 11/7/2022

List Size 1360 People

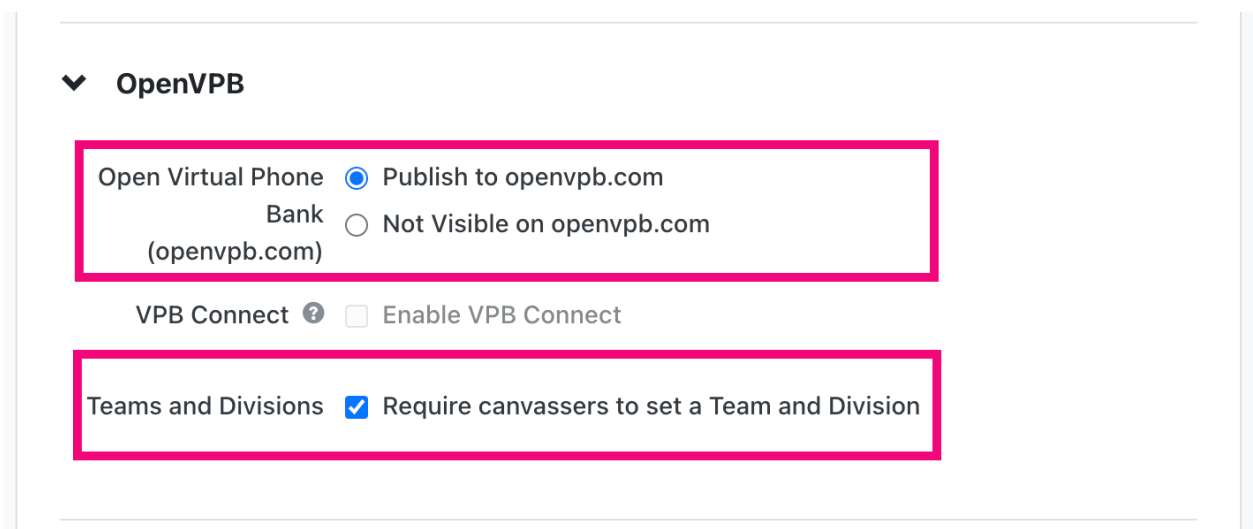
Publishing to OpenVPB

When you **select Publish to openvpb.com** you are **enabling your phone bank to run publicly**, bypassing the need to create new users in VAN.

Phone bankers go to openvpb.com, log in with an ActionID, enter the phone bank code you provide, and begin making calls. If you have enabled Daily Access Codes, participants will be prompted to enter them during the log in process.

[Read more about Daily Access Codes](#)

By default, **phone banks are set to Not Visible on openvpb.com**. If you do not toggle to OpenVPB and callers attempt to log in with your code, they will receive a message that the code is invalid.



Setting a Team and Division

For OpenVPB, you can require phone bankers to **set a Team and Division** before beginning a session, if Teams and Divisions are available in your committee.

Teams and Divisions allow you to **assign callers to groups for easy tracking and reporting**. Callers with VAN accounts and those using public access to OpenVPB can be assigned to a Team and Division. All **responses collected** during a caller's session are **applied to the Team and Division** they indicate.

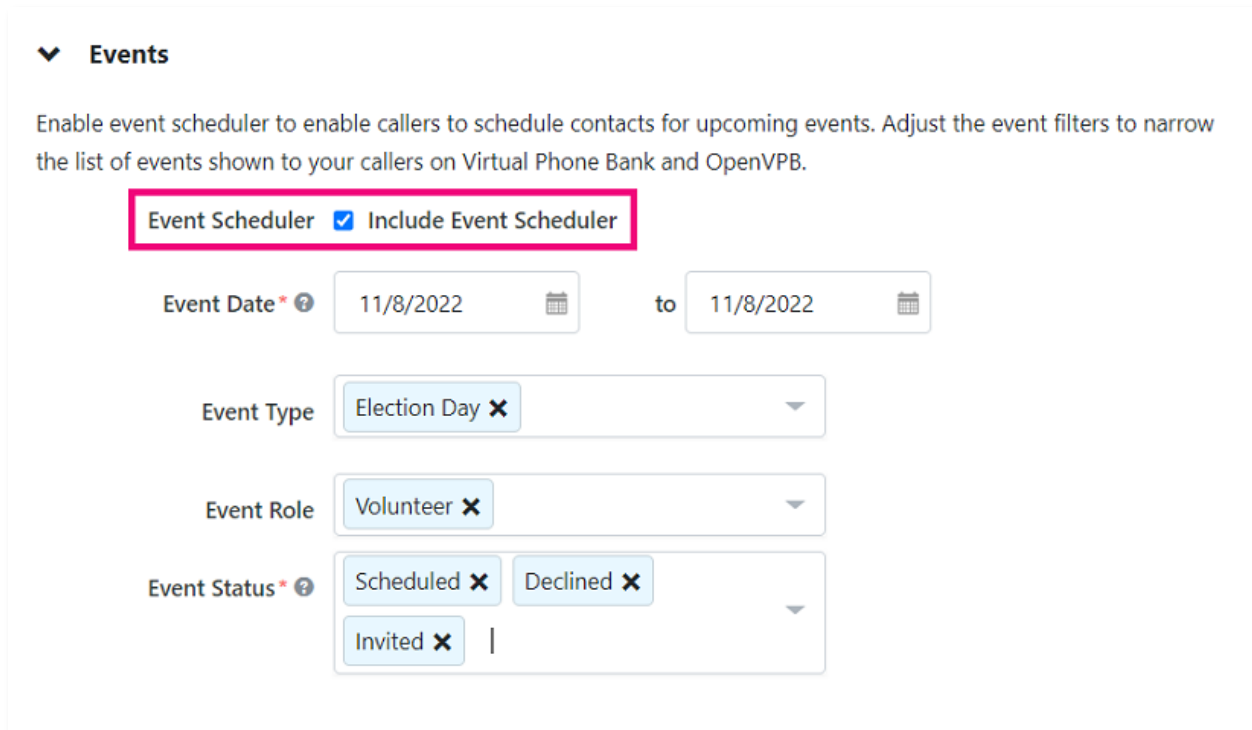
At the conclusion of a phone bank, when you run a **Canvass Summary in Report Manager** you can easily answer questions like, "which team has knocked the most doors today" or "what is the contact rate for each of my divisions?" Team and Division columns and filters are also available on the Contact History Report, Activist Codes Report, and Survey Responses Report.

Enabling Events

You can **give callers the ability to schedule people for upcoming events**.

Narrow the list of viewable events on VPB and OpenVPB by **filtering according to Event Date, Role, Type and Status**. Select a date range of up to one week.

You need to have created Event Types, Roles, and Statuses previously for options to appear in the dropdown menu.



The screenshot shows a settings panel for 'Events'. At the top, there is a section titled 'Events' with a dropdown arrow. Below this, a text instruction reads: 'Enable event scheduler to enable callers to schedule contacts for upcoming events. Adjust the event filters to narrow the list of events shown to your callers on Virtual Phone Bank and OpenVPB.' A red box highlights the 'Event Scheduler' toggle, which is currently checked and labeled 'Include Event Scheduler'. Below the toggle are several filter fields: 'Event Date' with a date range from 11/8/2022 to 11/8/2022; 'Event Type' set to 'Election Day'; 'Event Role' set to 'Volunteer'; and 'Event Status' with three selected options: 'Scheduled', 'Declined', and 'Invited'.

Event Scheduler is available for phone banks in My Voters, My Campaign, and EveryAction, but you can only **create and edit events in My Campaign and EveryAction**. If callers schedule people for events using a phone bank you created in My Voters, that information copies to My Campaign or EveryAction.

[Read more about Events](#)

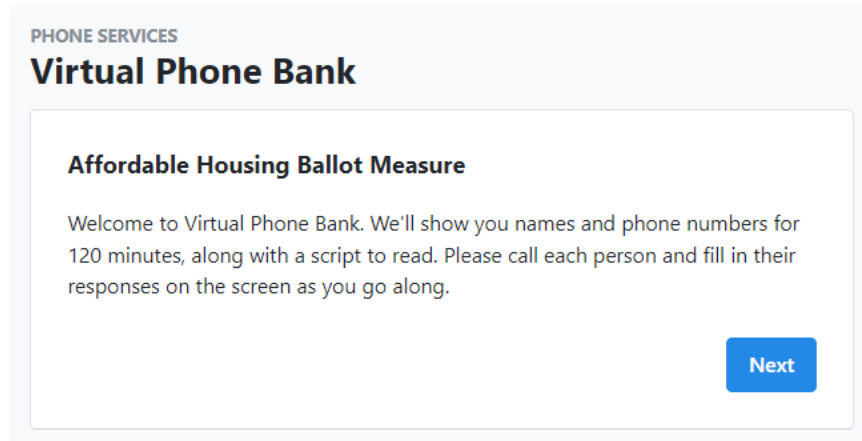
Additional Settings

Additional Settings are optional, but allow you to **further customize your phone bank in support of your outreach goals and in consideration of your volunteer and staffing capacity**.

- Daily Availability - **Limit when callers are able to phone bank each day**. You may, for example, only want calls going out during lunch time, or after the close of business but no later than 9pm. If callers attempt to join a phone bank outside of the hours you've set, they will see a message stating when the phone bank is available.

This Virtual Phone Bank is available from 10:30 AM to 2:00 PM

- Time Limit - **For VPB you can limit the length of time an individual caller can spend in a phone bank session.** A session is defined by when a caller logs in to the phone bank and when they log out.



PHONE SERVICES

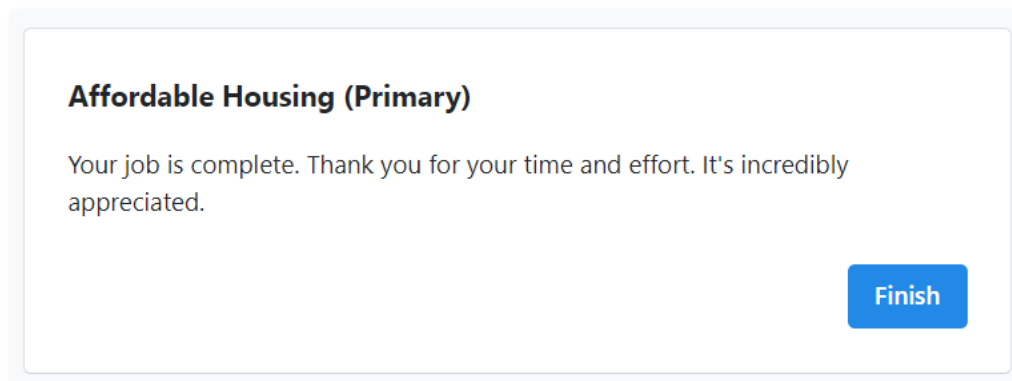
Virtual Phone Bank

Affordable Housing Ballot Measure

Welcome to Virtual Phone Bank. We'll show you names and phone numbers for 120 minutes, along with a script to read. Please call each person and fill in their responses on the screen as you go along.

Next

- Contact Limit - **For VPB you can limit the number of attempted or successful calls per session.** A call is successful when a contact is reached and results are entered in the script. If you choose to include a progress bar (see below) of individual progress, **the contact limit will determine the total number of contacts** represented.



Affordable Housing (Primary)

Your job is complete. Thank you for your time and effort. It's incredibly appreciated.

Finish

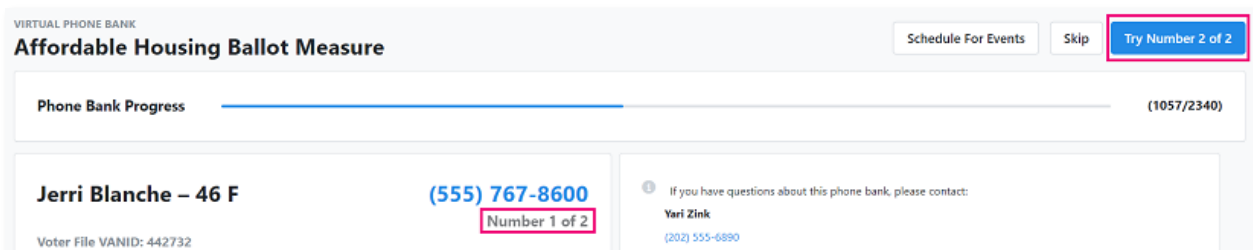
- Repeat - Allow callers to log out of ActionID and back in to **continue phone banking after they have reached the time or contact limit.**
- Distribute Contacts - **Distribute contacts by zip code** prompts the caller to enter a zip code, the caller's own, before phone banking. **Contacts in that zip code will be served to the caller first.** If the call universe does not include anyone from that zip code, the phone bank will serve the caller contacts at random, regardless of their proximity to the priority zip code. For example, it is possible to enter 94102 (San Francisco) and get contacts in 90036 (Los Angeles), if the call universe does not include or has run out of records in the priority area.

- Householding - **Householding groups contacts who share the same primary phone number in the phone bank.** Choosing **Do not display Also in Household** displays one member of a household at a time. **Show only people in Household from Virtual Phone Bank list** displays information of a contact and only that of other household members who are also on the list. **Show all Also in Household** allows a caller to see the information of everyone in a household, even those household members who are not on the list. Contacts marked as **Do Not Contact / Do Not Process** in their records will not be included when householding is enabled.

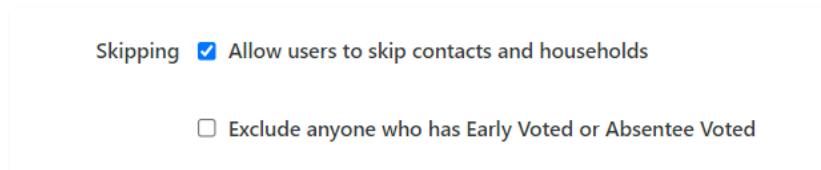


- Alternate Numbers - You can **allow callers to try multiple phone numbers associated with a contact** if you choose **Attempt all alternate numbers**. Callers will see one number at a time with an indicator of how many numbers are on the record. If they enter a result that means no contact was made, they will be given the choice of calling another number. Numbers are ordered from most recent entry into the database to the oldest. **Select Don't attempt alternate numbers** so that **the preferred phone number is the only option**.

If householding is enabled and other members of a household have different primary numbers on their contact records, **the caller will be able to call those other primary numbers**, regardless of whose contact record they are on.



- Skipping - **Allow callers to skip people or households.** Enabling this feature may shorten the length of a caller's phone bank session.



Dustin Dencklau

(555) 476-4199

33 M

Skip

Save & Next Call

I Couldn't Reach Dustin








- **Exclude Absentee & Early Voted and Exclude anyone who has voted on Election Day** - This setting is available for phone banks in My Voters and allows you to exclude people who have already early or absentee voted, **per the latest early vote update**. Excluding these groups may eliminate a high volume of contacts from your universe.

Skipping Allow users to skip contacts and households

Exclude anyone who has Early Voted or Absentee Voted

- **Status** - Your phone bank status is set to **Active when you create it and becomes Inactive 24 hours after its designated end date**. You can manually inactivate your phone bank early if you need. Reactivate an inactive phone bank by editing the end date to a point further in the future.

To **find an inactive phone bank**, open your Virtual Phone Bank List page from the Sidebar, change the status to Inactive, and Refresh Results.

-  Canvass Results
-  MiniVAN Campaigns
-  MiniVAN Commit
-  MiniVAN Formats
-  My Turfs
-  Virtual Phone Bank
-  Virtual Phone Bank List

PHONE SERVICES

Virtual Phone Bank Lists

Export To Excel Add New Phone Bank

Status Committee Name

Inactive

Active

Inactive

To User Group

Show Expired Virtual Phone Banks

Remember Filters Refresh Results

Choosing Display Settings

Use Display Settings to **control the information your callers see while phone banking**. If there are fields you want to display in the phone bank that are not included, submit a Support Request to see if we can make it available for you. Find Support Requests on your Main Menu.

- Designated Contact - Provide contact information for **the person volunteers can reach out to with questions or issues during the phone bank**.

Display Settings

Save & Preview

Customize the layout and information displayed on your Virtual Phone Bank.

▼ Designated Contact

Decide who virtual phone bank volunteers should reach out to if they need help.

Name Yari Zink

Phone (201) 555-3690

Email zinky@vpb.com

In **VPB**, the Designated Contact information appears **to the right of the information for the person being called**.

i If you have questions about this phone bank, please contact:

Yari Zink

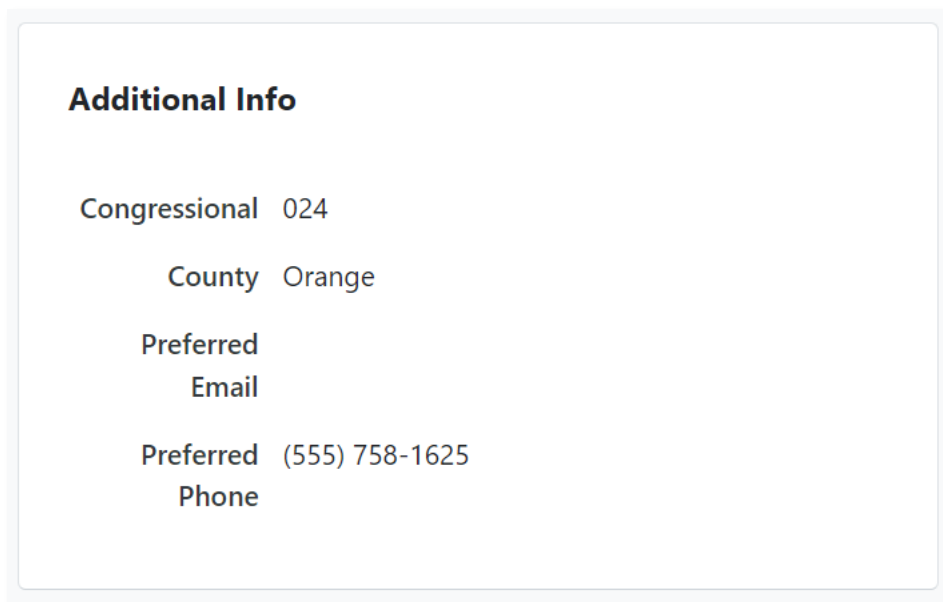
[\(202\) 555-6890](tel:(202)555-6890)

zinky@vpb.com

In **OpenVPB**, the Designated Contact information appears **above the information for the person being called**.



- Basic Demographics - Choose which **demographic information from the voter file** will appear for each of your contacts.
- Contact & Location Information - These fields are read-only, i.e. uneditable. Options include registration information, contact information, voting address, polling location, and specific districts.



- Editable Contact Details - When enabled, these fields will be **editable for callers**. In VPB, certain fields - phones for example - are only editable if a user's profile has been set up with the proper permissions. In OpenVPB the only editable fields are Phones, Email, Notes, and Self-Reported demographics.

[Read more about user profiles](#)

- Additional Contact Details - These fields are read-only (uneditable) and display **information from contact records**.

Including a Progress Bar

On the **in-app version of VPB only**, you have the option of including a progress bar at the top of the phone bank. This is not an available option of OpenVPB. To include on VPB, choose a progress bar that **displays the number of calls made against the contact limit or against the total number of contacts**.

Progress Bar

Customize the progress bar on your Virtual Phone Bank to show progress through your list.

Show Individual Progress

Show Entire Phone Bank Progress

VIRTUAL PHONE BANK
Affordable Housing (Primary) Schedule For Events Skip Save & Next Call

My Progress (12/30)
